

## **2024 TAX WORKSHEET**

## PERSONAL INFORMATION

	Name	Occupation	Date of Bir	rth Socia	l Security Number
TaxpayerSpouse					
Mailing Address	(PO Box or Street Address)		(6,1-)	(6, 1)	7. (.1)
	(PO Box or Street Address)		(City)	(State) (Z	Zip Code)
Home Phone	0	ffice Phone	C	Cell Phone	
Depe	endent's Name	Social Security Number	Relationship	Date of Birth	Child Care Expense
1. Can vou o	r your dependents be claimed	as a dependent on any o	other tax return?	□ Yes □ No	
•	ever been denied an Earned I	□ Yes □ No			
	ne custodial parent?	□ Yes □ No			
4. Has the ch	aild lived with you for at least	half of the tax year?			
Child Care Provid	ler Exnenses				
Name	Address		Federal ID	GET#	Amount paid

#### **MISCELLANEOUS**

Education Tuition and Fees, Please attach or bring form 1098-T & sum of books and supplies
Student Loan Interest Paid, Please attach or bring Form 1098-E
Distributions from a 529 plan, Please attach or bring Form 1099-Q
Did you already, or do you plan on contributing to an IRA or a SEP plan for 2024? ☐ Yes ☐ No
Did you install any energy efficient home property improvements? □ Yes □ No

## **INCOME**

Type of income	Form(s) to Attach or Bring to Appointment
Wages and Salaries	□ Form(s) W-2
Pensions, IRAs, Retirement	□ Form(s) 1099-R
Social Security	□ Form(s) SSA-1099
Unemployment	□ Form(s) 1099-G
Interest	□ Form(s) 1099-INT
Dividends	□ Form(s) 1099-DIV
Partnership, Trust, S-Corp	□ Form(s) K-1
Investments Sold	☐ Form(s) 1099-B & detail
Sale of Real Estate	☐ Form(s) 1099-S & closing statement
Gambling Winnings	□ Form(s) W-2G
State Tax Refund	□ Form(s) 1099-G
Other	

## **RENTAL INCOME**

	Property #1	Property #2	Property #3	Property #4
Address	<b>py</b>	o <b>p</b> o y		op oj
Rents Received:				
Advertising				
Association Fees				
Cleaning				
Gardening				
General Excise Taxes				
Insurance				
Interest				
Management Commission				
Property Taxes				
Refuse				
Repairs				
Storage				
Supplies				
Travel				
Electric				
Water				
Gas				

#### **ITEMIZED DEDUCTIONS**

Medical insurance premiums	Amount	<b>Taxes</b> Personal Residence Property T	Amount
Medicine & prescription drugs Doctors & dentists Hospitals & nursing homes Glasses & contacts Long-term care premiums Medical mileage		Other Property Taxes  Federal Estimated Taxes Paid  Date & Amount	State Est.Taxes Paid (Not GET)  Date & Amount
Tax Return Preparation Fees  Personal Residence Interest Expense: Name (Please bring Form 1098)	Amount	Charitable Contributions: Cash or Check:	Amount
		Non Cash Goods:	
Other Mortgage Interest Expense: Name (Please bring Form 1098)	Amount	Charitable mileage:	
		Charity out-of-pocket expense:	S:

#### W-2 EMPLOYEE BUSINESS EXPENSES (for state purposes only)

Travel (i.e. airfare, hotel, car, etc.)  Cell Phone  Education Expenses  Education Expenses  Internet  Office Supplies  Office Expenses  Office Rent  Professional Organizations  Professional Publications  Uniforms  Vehicle Description  Total Miles Driven in 2024  Business Miles Driven in 2024  Daily Commute (1 way)  Fuel & Oil  Repairs  Registration  Tires  Insurance  Lease + Deposit Paid in 2024	Meals & EntertainmentAutomobile Expenses:Travel (i.e. airfare, hotel, car, etc.)Vehicle DescriptionCell PhoneTotal Miles Driven in 2024Education ExpensesBusiness Miles Driven in 2024InternetDaily Commute (1 way)Office SuppliesFuel & OilOffice ExpensesRepairsOffice RentRegistrationProfessional OrganizationsTiresProfessional PublicationsInsurance		Am	ount			
Travel (i.e. airfare, hotel, car, etc.)  Cell Phone  Education Expenses  Education Expenses  Internet  Office Supplies  Office Expenses  Office Rent  Professional Organizations  Professional Publications  Uniforms  Vehicle Description  Total Miles Driven in 2024  Business Miles Driven in 2024  Daily Commute (1 way)  Fuel & Oil  Repairs  Registration  Tires  Insurance  Uniforms  Lease + Deposit Paid in 2024	Travel (i.e. airfare, hotel, car, etc.)  Cell Phone  Education Expenses  Education Expenses  Internet  Office Supplies  Office Expenses  Office Rent  Professional Organizations  Professional Publications  Uniforms  Vehicle Description  Total Miles Driven in 2024  Business Miles Driven in 2024  Daily Commute (1 way)  Fuel & Oil  Repairs  Registration  Tires  Insurance  Uniforms  Lease + Deposit Paid in 2024		Taxpayer	Spouse		Taxpayer	Spouse
Internet Daily Commute (1 way) Office Supplies Fuel & Oil Office Expenses Repairs Office Rent Registration Professional Organizations Tires Professional Publications Insurance Uniforms Lease + Deposit Paid in 2024	Internet Daily Commute (1 way) Office Supplies Fuel & Oil Office Expenses Repairs Office Rent Registration Professional Organizations Tires Professional Publications Insurance Uniforms Lease + Deposit Paid in 2024	Travel (i.e. airfare, hotel, car, etc.) Cell Phone			Vehicle Description Total Miles Driven in 2024		
Office Rent Registration Professional Organizations Tires Professional Publications Insurance Uniforms Lease + Deposit Paid in 2024	Office Rent Registration Professional Organizations Tires Professional Publications Insurance Uniforms Lease + Deposit Paid in 2024	Internet Office Supplies			Daily Commute (1 way) Fuel & Oil		
Uniforms Lease + Deposit Paid in 2024	Uniforms Lease + Deposit Paid in 2024	Office Rent			Registration		
		Uniforms					

# SCHEDULE OF SELF-EMPLOYMENT OR FARM INCOME

Principal business or profession \_\_\_\_\_

ss Income and/or Sales	Ф	
Cost of Goods Sold:		
Beginning Inventory\$		
Inventory purchased during year		
Materials and Supplies		
Less Ending Inventory		
Total Cost of Goods Sold	\$	
enses: Auto expenses (per vehicle):		
(For additional autos attach schedule)	Auto 1	Auto 2
Vehicle description	Auto 1	Auto 2
Total miles driven in 2024		
Business miles driven in 2024		
Daily commute (1 way)Fuel and oil		
Repairs		
Registration		
Tires		
Auto insurance		
Lease + deposit made in 2024		
Accounting		
Advertising		
Bank Charges		
Cell Phone		
Commissions		
Dues & Publications		
Education & Seminars		
Employee Benefits		
Employer portion of payroll taxes		
Equipment Rental		
General Excise Tax paid in 2024		
Freight		
Gifts		
Gross Employee Salaries		
Home Office Square Footage		
Health Insurance Premiums		
Interest Expense		
Internet Expense		
Large Equipment Purchases (List Separately)		
Legal & Professional Fees		
Liability & Business Insurance		
Licenses and Permits		
Meals (Entertainment is no longer deductible)		
Office Expenses		
Office Rent		
Outside Services		

	Parking			
	Postage			
	Printing			
	Repairs			
	Storage			
	Supplies			
	Telephone			
	Tools			
	Travel (excluding meals)			
	·			
A agota 1	Purchased:			
Assets		Date	Durahasa miaa	
	Description	Date	Purchase price	
		<del></del>		
	***Hawaii Ge	eneral Excise Tax Number		***